

ORIENTATION & GUIDE TO COLLEGE OF NURSING (CON) RESEARCH SUPPORT FOR POST GRANT MANAGEMENT

Date Reviewed	Name:
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Common Questions

A. I'm funded (or close to funding)! What do I need to do now?

1. See Linda Thomsen, Grant Management Specialists , CON Office for Nursing Research and Scholarship (ONRS)
Location: 203-13 NB
Phone: 319-335-8581
E-mail: linda-thomsen@uiowa.edu
2. Visit the UI Department of Sponsored Programs (DSP) website <http://dsp.research.uiowa.edu/> and review their resources
 - a. Policies and Procedures at <http://dsp.research.uiowa.edu/policies-and-procedures>
 - b. Research Administration Handbook at <http://researcherhandbook.research.uiowa.edu/>

B. I need to hire staff for my grant. What do I do?

1. Contact CON Human Resources Administrator, Debra McFall-Wallerich
Location: 101Q NB
Phone: 319-335-7014
E-mail: deb-mcfall-wallerich@uiowa.edu
 - a. Staff management and resource website: <http://researcherhandbook.research.uiowa.edu/7-staff-hiring-and-supervision>
 - b. Job descriptions
 - 1) Graduate Research Assistants –
 - The CON encourages giving priority to nursing graduate students when a GRA position is available. Matching of nursing graduate students to GRA positions is coordinated through the ONRS. Please contact Nancy Goldsmith for assistance in recruiting nursing graduate students for GRA positions.
 - Posting a position with the UI Graduate College <http://www.grad.uiowa.edu/graduate-assistant-job-postings>
 - COGS union contract <http://www.uiowa.edu/hr/relations/bargaining/cogs/cogs.html>
 - 2) Undergraduate Student Assistants –

- Recruiting through the Office of Student Financial Aid <http://www.uiowa.edu/financial-aid/employment/> includes advertising job opportunities on UI *Jobnet*
 - UI Operations Manual employment limitations <http://www.uiowa.edu/~our/opmanual/iii/04.htm>
 - Post recruitment steps to employing a new CON biweekly student – See Linda Spence, CON HR Secretary, 101N CNB
- 3) P&S and Merit Job Descriptions/Pay Grades/Salary Ranges – <http://www.uiowa.edu/hr/classcomp/index.html>
 - 4) If you hire a person who requires specific licensure or certification, the grant PI or Project Coordinator is responsible for checking that licenses/certificate are current.
- c. Steps to reclassify a P&S or Merit job <http://www.uiowa.edu/~our/opmanual/iii/03r.htm>
 - 1) P&S: Tools for the Documentation of Career Development if and when you experience changes in job responsibilities during the budget year. <http://www.uiowa.edu/hr/classcomp/prof/index.html>
 - 2) Merit PDQ Form: <http://www.uiowa.edu/hr/classcomp/merit/index.html>
 - d. Advertising P&S or Merit job positions – see Debra McFall-Wallerich
 - e. Interviewing
 - 1) CON positions - set up by Debra McFall-Wallerich, CON HR Rep or Linda Spence, CON HR Secretary
 - 2) Grant positions - set up by research project PI
 - f. Offering job – letter prepared and sent by Debra McFall-Wallerich, CON HR Rep
 - g. Appointing staff (CON Operations Manual III-3m 3.2) – Linda Spence, CON HR Support, guidelines
 - h. Bi-weekly hourly time sheets – contact the Linda Spence
 - i. Staff evaluations – You will find the following evaluation forms on the College of Nursing shared drive at L:/Evals for your use:
 - 1) Checklist for Supervisors
 - 2) Improvement Plan
 - 3) Performance Appraisal Form
 - 4) Self Evaluation for employees
 - 5) Research Assistant Evaluation & Feedback forms are found in the CON - RA/TA Information Handbook (contact Linda Spence)
 - j. Terminating staff
 - 1) Performance and Discipline <http://www.uiowa.edu/hr/relations/hrrep/>
 - 2) Notify Debra McFall-Wallerich with all staff termination dates during and at close of a research project.

C. How do I get office space for my grant staff?

1. Space Committee – This committee determines the allocation of office space for faculty, academic programs, research, and other special programs. Hazel Kerr, Assistant Dean of Operations and Finance, chairs this committee. Contact her for a copy of the *Space Allocation Principles*.
<https://groupshare.uiowa.edu/CONIntranet/Shared%20Documents/Space/SpacePrinciples-FINAL%20120809.pdf>

D. What do I do about IRB? Institutional Review Board (IRB) and Human Subjects Office (HSO)

1. HAWK IRB website: <http://hso.research.uiowa.edu/>
2. Contacts: <http://hso.research.uiowa.edu/contact-us>
 - a. Human Subjects Office staff (101 Hardin Library) are available twice a week to answer questions and provide guidance on human subjects research-related issues. No appointment necessary. Computers are available to access HawkIRB. Contact 335-7310 for dates and times.
 - b. In-house CON assistance with completing HawkIRB applications is available from ONRS administrator Nancy Goldsmith nancy-goldsmith@uiowa.edu.
3. Do I need IRB Review? Is This Human Subjects Research? A Guide for Investigators
<http://hso.research.uiowa.edu/?get=hsrd&view=1>
4. Training sessions <http://hso.research.uiowa.edu/educational-resources>
 - a. CITI - Collaborative Institutional Training Initiative <http://hso.research.uiowa.edu/certifications-human-subjects-protections-citi>
 - b. How to Complete a New Project Application
 - c. What Do I Have to Do After IRB Approval: Continuing Reviews, Modifications, REFs and Closing a Project
5. CBR - Community Based Research Program <http://hso.research.uiowa.edu/community-based-research-cbr>
 - a. UI researchers engaged in research collaborations or affiliations with non-University organizations
 - b. Special assistance to ensure regulatory compliance for researchers at UI and their research affiliates throughout the state.
6. Conflict of Interest (COI) Disclosure
 - a. To submit grant proposals or IRB applications, all Faculty, Postdocs, Students, etc. who are listed as PIs or Key Personnel must complete a UI COI Disclosure Form.
 - b. Annual certification can be submitted electronically at <http://ecoi.uiowa.edu>

E. Who can help me set up and keep track of my grant budget?

1. CON Business Manager I, Cheri Arneson
Location: 101J NB
Phone: 319-335-7011
E-mail: cheri-arneson@uiowa.edu
 - a. CON Expectations for Account Reconciliation. Contact Cheri for a copy of this procedure.
 - b. UI Policy - Monthly Review of Transactions & Accounts <http://afr.fo.uiowa.edu/policies-procedures-resources/monthly-review-transactions-and-accounts>
2. Set up MFK account number(s)
 - a. Externally funded grants
 - 1) The Grant Accounting Office (GAO) will automatically do this and notify the Principal Investigator (PI) and the departmental and collegiate offices of the Master File Key (MFK or WhoKey) grant/program number(s) applicable to the sponsored project.
 - 2) Funds will not be released for use until proof of IRB approval is provided.
 - 3) You can request an 'advance MFK' if needed. See Nancy Goldsmith
 - b. Internally funded grants
 - 1) CON Funding - the PI must communicate need for a MFK account number to Cheri Arneson
 - 2) Other UI funding sources - the awarding department will issue the MFK account number
3. Monthly reconciliation of MFK account(s)
 - a. Determine who (Faculty/PI or Project Coordinator) will conduct monthly reconciliation of grant account(s) and contact Cheri Arneson to set up receipt of e-mail notice for monthly review of your account transactions.
 - b. The Grant Accounting Office will provide Faculty/PI (account owner) and a staff person (account reviewer) with a monthly email notice that the Transaction Detail Report (TDR) is ready for online reconciliation.
 - c. The TDR can be accessed via the email message or through your Employee Self Service portal; Administration tab; Data Access section; Electronic Financial Reports line.
 - d. The TDR often prompts inquiries regarding certain transactions or about the overall accuracy or timeliness of the information presented. The GAO (319/335-3801) is available to answer transaction questions or to assist faculty and staff in determining the current fiscal status of their sponsored projects.
 - e. Other financial reports are available through the Finance and Operations (FO) web portal of your Employee Self Service site. If you do not have access to EFR (Electronic Financial Reports), contact Cheri Arneson.
 - f. Linda Thomsen, Grants Management Specialist, is available to assist and guide faculty with small grants in learning how to monitor and reconcile their MFK accounts.

- g. Nancy Goldsmith, Grant Development Specialist, is available to assist and guide students and post doctoral scholars with small grants in learning how to monitor and reconcile their MFK accounts.
- 4. Closing your grant account(s)
 - a. The process of closing out the account may differ, depending on the grant sponsor, but there are several things to keep in mind...
 - What final reports need to be submitted? Which ones are you responsible for?
 - When are they due? Most sponsors require submission within 45-90 days.
 - Have all charges been posted to the account?
 - Do any final purchases need to be made? Remember that all items must be ordered before the budget end date.
 - Have all subcontractors finished their work and has the final invoice been submitted to the UI for payment?
 - Will all funds be spent or will there be unspent funds returned to the sponsor?
 - All charges must be in place within 60 days of the project's end date. This applies to all sponsored-accounts, as well as their corresponding cost share accounts.
 - Notify the CON HR Rep (101CNB) with staff termination dates.
 - Close mailing accounts numbers for metered and Business Reply (postage paid) postage.
 - Stop access codes to make long distance telephone calls and use photocopiers in the Research Suite and ONRS.
 - Return grant pCard (credit card) to the Accounts Payable office.
 - b. Keep in touch with the Grant Accountant assigned to your study project
 - Notify them of any changes that will affect the end date, the status of the project or the submission of the reports.
 - Once your account has a 'zero' balance, ask them to 'Close' your MFK account.
 - After all reports have been submitted to and approved by your funding Sponsor, direct your Accountant to 'Inactivate' the MFK account. This will remove the account from the monthly TDR reconciliation notice list.
 - c. Office space clearing...
 - Contact Hazel Kerr, CON Space Committee Chair, regarding desks, chairs, file cabinets, etc.
 - Contact Pat Whetstone, CON ITS Manager, concerning computers (laptops, tablets, etc.), printers, scanners, etc. that were purchased with grant funds.
 - Return office keys to doors, desks, filing cabinets, etc. to Bill Donahue, 101 CNB with name of the previous owner attached to the keys.
 - Paper files and documents
 - CON does not provide permanent storage space for paper files.
 - Larger grants usually have funds budgeted for scanning the data for permanent storage.

- All file cabinets will need to be cleared out (including the ones in the second floor Research Suite storage room 237CNB, if you've used them).
 - Hanging folders, manila folders, binders, staplers, tape dispensers, paper clips, and other miscellaneous office supplies can be recycled and used by other grant projects. Contact the Office for Nursing Research and Scholarship to collect these items.
5. UI Accounting Services provides a User Manual for the online Transaction Detail Report at http://afr.fo.uiowa.edu/files/afr.fo.uiowa.edu/files/tdr_user_manual.pdf. There is also an on-line ICON TDR course. For details, please go to <http://www.uiowa.edu/~fusstfdv/catalog/workplace/ICON/WASTDR.html>. You may sign up for the course through “My Training” in Self Service.
 6. See the Grants Management Support - Section I. for more information about *Managing Grant Funds*

F. How do I purchase supplies and services?

1. Purchasing Department - General Information 335-0115 <http://www.uiowa.edu/purchasing/>
 - a. Large grants: Project Coordinators of large grants purchase supplies and services for the grant PI
 - b. Small grants: Linda Thomsen will support faculty of small grants (i.e., those without administrative personnel). Linda Curran will support students (Predocs and Postdocs) purchasing supplies and services funded by their fellowships
 - 1) Supplies: They can use a P-Card or complete a P-Req to purchase supplies already identified by the PI. All PIs are expected to provide detailed information on the exact items to be ordered (quantity, serial numbers, etc.). PI's are expected to be cognizant of costs allowed on their grants.
 - 2) Services: They can create an e-Voucher for payment for services (e.g., transcription, consultant fees, honoraria paid to research sites, visiting nurse services, etc.) provided by individuals/businesses/agencies for faculty research projects can be arranged.
 - 3) Subaward or PSA: Linda Thomsen will also assist in setting up necessary subawards and professional service agreements.
2. Electronic purchasing system (One Stop e-Procurement)
 <https://login.uiowa.edu/uip/login.page?service=https://preqs.its.uiowa.edu/preqs/home.page>
 ACCESS to online form for approval to use the system
 - Self Service
 - EPro (e-Vouchers and PReqs)

- PReq
 - Forms (left side of page on blue bar)
 - Preqs access form.
 - Route form to Cheri Arneson for approval
- a. General Stores: 384-3906 <http://www.uiowa.edu/~fusmm/ustores.html> Order are made through e-Buy
 - b. e-Vouchers (electronic purchases <\$3,000 that do not require a PO voucher and Accounts Payable mails a check or direct deposits payment)
 - Training is available at <http://www.uiowa.edu/~purchase/ap/ev/>
 - Paying more than one research subjects
 - Use the 'Create Bulk Voucher' feature (Instructions & Template) along the left side of the e-Voucher screen
 - Enter subject information (vendor ID is not needed) and save the spreadsheet in an old version of Excel (97-2003 .xls) because the newer version (*.xlsx) doesn't transmit via the e-Voucher system. Then browse, and upload (attach) the file to your e-Voucher request.
 - Also, the system is 'touchy' and you can't just use a prior version of your spreadsheet, i.e. replacing with new subjects. Deleting information in highlighted cells will not work. However, you can delete rows of subject information from a prior saved spreadsheet and use it. It is best to use a new copy of the template.
 - Personal reimbursement for supplies purchased for research projects funded by small grants: Linda Thomsen will process for Faculty and Linda Curran will process for pre/postdoctoral students. A sales receipt must be provided for reimbursement. **PI's should note that they cannot be reimbursed for sales tax.**
 - c. PReq (purchasing requisitions for large for off campus purchases > \$3,000). Training is available at http://www.uiowa.edu/purchasing/preqs/docs/PurchaseReq_Training.pdf
 - d. e-Buy (connects directly with primary vendors). Disadvantage is purchase must go through workflow before item is sent. Training information is available at http://www.uiowa.edu/purchasing/ebuy/eb_train.htm
 - e. PCard (procurement credit card) purchases: 335-0656. ACCESS to online form for approval to use the system
 - Self Service
 - ProTrav (Pcard Vouchers & Travel
 - PCard tab
 - more Forms (left side of page on blue bar)
 - Access request form.

- Complete & take to Cheri Arneson for signature
 - Send to Accounts Payable
 - Take online training at <http://www.uiowa.edu/purchasing/pc/index.htm>
- f. Pro Trav (travel related expenses). Training information is available at <http://www.uiowa.edu/purchasing/travel/> Joyce Andrews, Faculty Services, 310 CNB, 335-7067 will arrange travel for CON faculty and Linda Curran will arrange for graduate students and postdocs traveling on UI business. They will
- Initiate trip approvals.
 - Purchase airline tickets with their UI pCards
 - Process *reimbursements* use of a private (e.g., PI's) car, and hotel costs (items that must be paid for using the traveler's credit card).
 - Order fleet services vehicles, arrange for car rental, and pay conference registration fees.
 - Process travel reimbursements, PReqs, and E-Vouchers and submit through workflow for approval .
- 1) Travel expense vouchers (TEVs) must be submitted within 120 days of trip end date.
 - 2) Travel expenses will not be reimbursed if the TEVs are not submitted within this time frame.
 - 3) Exceptions to this policy must be justified and approved by the Travel Office.
 - 4) UI Travel Regulations <http://www.uiowa.edu/~our/opmanual/v/22.htm>
 - 5) UI Travel Manual http://www.uiowa.edu/purchasing/travel/docs/Travel_Manual.pdf
 - 6) ProTrav Training guide http://www.uiowa.edu/purchasing/pc/protrav/docs/Protrav_Travel_Train.pdf
- g. UIHC Hospital Processed Stores for medical supplies and equipment.
<http://www.healthcare.uiowa.edu/matsrv/ps/index.htm>
- The Processed Storeroom is located in Room 0307 JCP
 - Phone (319) 356-1784 Gary Hagen, Supervisor
 - Hours of operation are 7 am to 8:30 pm Monday-Friday
 - Stores catalog in EXCEL spreadsheet is available from Kirby Luckett 6-1960
 - Items are ordered via PReq. Contact Chris Leichty 5-0384 to obtain access to the PeopleSoft Catalog Order Form.
- h. Biochem Stores for medical supplies and equipment.
- Phone (319) 335-7927 or (319) 335-8134.
 - Hours of operation are 8am-12pm and 12:30-4:30pm
 - Online Inventory Catalog is available at <http://stores.biochem.uiowa.edu/CatIndex.htm>

- To order supplies/equipment, go the Biochem Stores, located in Room 4-321 BSB (Bowen Science Building), and obtain an account number. You will need the grant MFK number, PI's name and grant name. A Biochem Stores Express Card will be issued for future purchases.
 - Purchases can be made onsite at the Stores
 - Orders can be placed via fax (319) 353-5970. Order form is available at <http://stores.biochem.uiowa.edu/orders.pdf>
 - All purchases are picked up at the Bowen Science Building, Room 4-321
- i. Scanning purchase receipts to .pdf file
- 1) The photocopier in the Research Suite 203 CNB has scanning capability
 - 2) See Linda Thomsen for directions on operating the scanner
3. Coursework, i.e. tuition, books, etc.
- a. Training grants (F and K series grants) may provide funding for coursework.
- UI campus courses can be paid for via the MAUI student information system. Provide a copy of your U-Bill to your grant manager for processing.
 - Off campus courses can be paid for via a PCard or personal credit card. Work with your grant manager for payment or reimbursement.
4. Foreign Services.
- If you are paying someone for services that are not here in the United States – such as the payment for translation to someone in Brazil – this should be done on paper (in the future it will be electronic).
- You can't complete an e-Voucher because it requests that you put in their immigration status – which they don't have – so it is always invalid and cannot be sent to workflow.
 - You will need to submit paper forms for payment (It will become electronic in the future.)
 - You complete a Payroll voucher found at <http://www.uiowa.edu/hr/payroll/forms/prvch.pdf>. In the SectionIV Description box, state that all work was done outside the United States.
 - The payee needs to fill out at a minimum, Part I (stating non-US citizenship) of the W-8BEN form http://international.uiowa.edu/files/international.uiowa.edu/files/file_uploads/fw8ben_1.pdf On the Payroll
 - UI payroll assistance - Marianne Stratton 335-2420 or Katie Villhauer 335-2380

G. Who can help me with grant reporting requirements?

1. Review your Contract Conditions and Terms and look for
 - a. Reporting times, i.e. Quarterly, Annual, Fiscal Year, etc.
 - b. Types of report, i.e. Budget, Progress, etc.
2. UI Office of Sponsored Programs will send a reminder to Nancy Goldsmith and she will forward it to you.

Other Information

H. Orientation of Faculty and Staff

1. University of Iowa Orientation includes Benefits, Personal & Professional Development, Services & Amenities, Facilities, Transportation, Discounts, Programs & Activities
2. College of Nursing - Debra McFall-Wallerich, CON Human Resources Administrator, will provide general orientation to CON staff organization, building layout, departments and policies.
3. Employing Department Unit may also provide general work related information, job specific information, staff organization, attendance expectations, meeting schedules, etc. <http://www.uiowa.edu/~fusstfdv/orientation/gencklist.html>
4. Office for Nursing Research and Scholarship, orientator Linda Thomsen
 - a. Department Structure
 - 1) Department Chair – Ann Marie McCarthy, PhD, RN, FAAN, Professor and Associate Dean for Nursing Research & Scholarship
 - 2) Department Director – Linda Liu Hand, PhD
 - 3) Grant Development Specialist (Pre-Grant Applications) – Nancy Goldsmith, BA
 - 4) Grant Management Specialist (Post-Grant Awards) – Linda Thomsen, RN, BS
 - 5) Statistician – Yelena Perkhounkova, PhD
 - 6) Data Manager – Maria Hein, MSW
 - 7) Editor – Contact Linda Curran for contracted editorial services
 - 8) Secretary – Linda Curran, Sec III
 - 9) Statistician for PhD Students – Contact Linda Liu Hand for contracted statistical services
 - b. Introduction to staff & office locations
 - c. Tour of Research Suite on second floor of CON

I. Grant Management Support – Linda Thomsen

1. HR Post Award Grant Management Course: <http://www.uiowa.edu/~fusstfdv/catalog/workplace/95.html>
2. General Monthly Meetings
 - a. CON Staff – 1st Wednesday, 10 am, Rm 133NB
 - b. Grant Coordinators – As requested by coordinators
 - c. Rooms for Research Study Team Meetings and Clinical Lab activities
 - 1) Schedule Research Conference Room 230, Interview Room 203C and Clinical Lab Rooms in 203B through Microsoft Outlook or contact Linda Curran, Nancy Goldsmith or Linda Thomsen to reserve a room. Large grant coordinators can obtain access to these ONRS calendars for scheduling purposes – Contact Nancy Goldsmith.
 - 2) Book these rooms using the ONRS calendar. DO NOT include 'Invite Attendee'.
 - 3) Send 'Invite Attendees' from your own calendar, otherwise the ONRS will receive all e-mail messages regarding acceptance or declines from attendees.
 - 2) Directions for using wireless computer, mouse, keyboard and monitor are available in Room 230.
3. Orient to UI websites:
 - a. CON: <http://www.nursing.uiowa.edu/>
 - b. UI: <http://www.uiowa.edu/> and navigation of Faculty/Staff information
4. Hardin Library for Health Sciences: <http://www.lib.uiowa.edu/hardin/>
 - a. Nursing Contact: Jennifer DeBerg at 5-8554 can assist with establishing database searches i.e. PubMed, CINAHL, Evidence Based Resources, Library Tours, Literature Searching, NIH Public Access Policies, RefWorks, EndNote, Web of Science, etc.
5. RefWorks: <http://test.lib.uiowa.edu/find/refworks/>
 - a. Free UI supported tool. Web-based citation management and bibliography tool that helps you efficiently store, organize, and share citations and easily format them for papers and bibliographies.
 - b. Guides/Tutorials: <http://www.refworks-cos.com/refworks/tutorials/>
6. Survey Tools and Data Entry System creation
 - a. Maria Hein, ONRS Data Manager, provides data management support, including developing, cleaning and managing data files; designing and working with existing databases; building datasets from a variety of sources; assisting with statistical analysis; and preparing tables, charts, and other graphics for publication
 - b. REDCap: offers both a database platform and an online survey platform. Structured online forms can be created to simplify and constrain data entry as your data are entered into a database. Online surveys can also be created in REDCap so that study participants can click on an email link to begin completing a survey.
 - 1) Provided free by ICTS-Institute for Clinical & Translational Science <https://redcap.icts.uiowa.edu/redcap/>
 - 2) Tutorials at <https://redcap.icts.uiowa.edu/redcap/index.php?action=training>

- c. Qualtrics: another online survey option available for free at the University of Iowa. It is useful for surveys with more complex question types, graphics, or when you want to automatically have survey responses emailed to you or others.
 - 1) Contact UI Information Technology Services <http://its.uiowa.edu/qualtrics>
 - 2) Step by Step assistance to create a survey at <http://www.qualtrics.com/university/researchsuite/basic-building/getting-started/creating-a-survey/>
- 7. Managing Grant Funds
 - a. Any change in faculty/staff salary support must go through the CON Human Resources Assistant
 - 1) Appointments MUST be done SOON after the grant award notice is received – within a week or two. Contact CON HR for processing appointments and any changes.
 - 2) At the same time, let Cheri Arneson know
 - a) The percent of effort of any faculty who are appointed to your grant;
 - b) When that effort begins and ends.
 - 3) You may NOT change the percent of effort of any faculty at a later time without contacting Cheri Arneson first.
 - b. Assistance in setting up a monitoring system for your grant funds. Grant PIs are expected to be cognizant of expenditures and to spend within their approved budgets. Linda Thomsen will serve as a secondary reviewer of faculty research grant accounts. Nancy Goldsmith will assist pre and post-doctoral students with grants. They will
 - 1) Train faculty on how to read and reconcile their monthly Transaction Detail Reports (TDR)
 - 2) Provide training and serves as a back-up reviewer only.
 - c. MFK Accounting Code Manual <http://www.bo.uiowa.edu/~glaccman/index.cfm>
 - d. Example spreadsheets to monitor the grant budget – Contact Linda Thomsen
 - e. Study participant compensation
 - 1) \$25 or less - e-Voucher payment or Gift Cards:
 - a) e-Voucher payment – see item 2) below.
 - b) Gift cards are considered cash
 - UI Accounting Services requires a policy, money handling training, and audits.
<http://afr.fo.uiowa.edu/cash-handling>
 - You will also need to complete the ICON course for cash handlers. Use your HawkID and Pass word to Login to your Employee Self Service website. Select the Personal tab, look for the Learning and Development section and click on the My Training link. Click on the Available Online ICON Courses link. Select the ‘Cash Handling’ course in the Description list. This is mandatory training for all cash handlers.

- IRB will need documentation that UI Accounting Services has approved your plan for accountability of gift cards. Complete the 'Research Subject Compensation Template' at <http://afr.fo.uiowa.edu/cash-handling/research-subject-compensation> and email to Accounting Services for approval, then attach the approval email to your IRB request.
 - To maintain the required segregation of duties, at least two, but preferably **three**, different people must be involved: one to purchase the cards, a second to distribute the cards and maintain a log of all card recipients, and a third person to reconcile (verify that the number and value of the cards purchased matches the amount charged to the grant account and to verify that the recipients in the distributor's log are valid). For projects with limited personnel, the purchaser and distributor can be the same person. If the PI purchases the cards, Linda Thomsen (small faculty grants) and Linda Curran (pre and post-doc grants) will process the reimbursement and act as the reconciler. If the PI prefers to have the ONRS purchase the gift cards, the PI must designate a distributor and a reconciler (cannot be the same person, but one can be the PI). The ONRS will purchase gift cards from either Walmart or Target, once a month on the first day of the month. Linda T will also provide PI's with training on gift card handling as well as a spreadsheet templates for record-keeping.
- 2) More than \$25 - e-Voucher payment: <http://www.uiowa.edu/~purchase/ap/ev/> information, tutorials and help
 - a) Linda Thomsen will work with Faculty and Linda Curran will assist pre and post-doctoral students in processing the e-Voucher. The following information must be obtained.
 - b) The PI or research assistant must complete a *Payroll Voucher Participant Form* or facsimile that collects names, citizen status, address, and Social Security numbers for each participant.
 - c) Send the completed form to Linda Thomsen or Linda Curran.
 - f. Finance and Operations (FO) Department website: <http://fo.uiowa.edu/>
 - g. NCE-No Cost Extension:
 - 1) PI should request NCE about 60 days prior to end of the grant period through the DSP-Department of Sponsored Programs.
 - 2) DSP will process the request to the grant Sponsor
 - 3) Be sure to ask for 12 months because DSP can only issue one NCE and you want the longest period possible, even if you think you need less time.
8. Photocopying
- a. Access code linked to your grant MFK# is needed to use the copy machines in the 203 CNB Research Suite and ONRS Room 439. Contact Bill Donahue, CON F&O Office, for access code.

- b. Use a UI Copy Center for large orders <http://www.uiowa.edu/~prntmail/copyctrs.shtml> Linda Curran, ONRS Secretary, will order *research-related* print jobs at copy centers for Faculty or students with large print jobs.
 - c. Teaching-related copying requests should go through Teaching Services.
9. Mail
- a. Location of mailboxes for incoming & outgoing materials
 - b. Contact Central Mail Services for bulk & metered mail processes <http://www.uiowa.edu/printmail/mailevc.shtml> Linda Thomsen can assist you in obtaining mailing cards for outgoing metered mail and *Business Reply Labels* for return postage paid envelopes.
 - c. UPS drop box outside the CON will handle both *next day* and *ground* mail delivery. If you call UPS to schedule a pick-up, you have to pay an extra fee. To save money, consider using the drop box as they pick up at the end of each day.
 - d. FedEx box outside the CON will **only** handle *next day* mail delivery. FedEx Ground outgoing packages/boxes can be left on the corner of the work station in the middle section once you enter the Dean's Suite in 101 CNB.
10. Long Distance Telephone Calls
- a. Research Suite (Rooms 203, 203B, 203B-2, 203C, 230): Access code linked to a grant MFK# is needed for long distance phone calls. Bill Donahue, CON F&O Office, assigns access numbers.
 - b. Phone cards are a legitimate grant purchase. However for audit purposes, you need to keep a record/log of phone calls made from the card. Contact Linda Thomsen for an example log.
 - c. Other study participant contact options for telephone conferencing, recording, and downloading calls to computer. Contact the CON Information Technology unit.
11. Transportation Needs
- a. In town transportation
 - 1) Cambus routes and schedules for travel to campus sites are found at http://www.uiowa.edu/~cambus/routes_and_schedules.html
 - 2) CON car is available for Iowa City or Coralville sites. Reserve use of the car through the support staff in 101 CNB.
 - b. Out of town vehicles are arranged through the UI Fleet Services (motor pool). Joyce Andrews, Faculty Services, 310 CNB, 335-7067 can assist you in reserving a vehicle.
 - 1) Car rental information can be found at http://www.uiowa.edu/~uifleet/daily_rental.html
 - 2) Reservations for vehicles may be placed electronically by using the *Employee Self Service* portal. After logging in, go to the *Administration* tab and look in the *Forms* section for the *Fleet Services Requisition* form. Click on the *Start a new requisition* link, complete the requested information and route it to workflow.
 - 3) If you have any questions, contact the Fleet Services office at 319-384-0564.

- 4) Reservations will be cancelled at no charge if Fleet Services is notified at least 2 hours before the scheduled pick up time.
- c. See the ProTrav information in section F.2.f.
- 12. Records of Consent for UIHC Study Subjects
 - a. When using UIHC patients for study participants, IRB will require that a 'Record of Consent' be placed in the patient's electronic medical record. <http://hso.research.uiowa.edu/record-consent-faq>
 - b. The PI should ensure the consent form is provided to the appropriate chart control contact in order to have the form entered into the EPIC system. The form will be scanned and placed into EPIC. Use the following link to UIHC chart control contacts for the ROC's. <http://hso.research.uiowa.edu/departmental-chart-control-contacts> Try going through the appropriate person on the list first. If your study uses patients from more than one department at UIHC, ROC's can be taken to one of two locations at the hospital for scanning into the medical record:
 - Patient Relations Office: 1st floor. Walk several feet from the compass toward the main hospital cafeteria and, before you get to the cafeteria, you'll see a door on your right: "Patient Relations". You can ask them there where to put them.
 - Release of Information Office: 2nd floor. From the compass, walk south just past Elevator C, turn right and go through two sets of double doors. The room number of their main office is 2079 SRF; you can ask them where to put the forms.

Miscellaneous

J. Miscellaneous

1. Recycling – The College of Nursing participates in the UI *Single Stream* program. That means newspaper, office paper, cardboard, lab plastics, nonredeemable drink containers, plastics, tin, aluminum, and most food containers can now be placed in the same collection bin instead of being sorted into individual containers. Looks for designated bins distributed around the CON building.
2. Empty Toner (Ink) Cartridges – UI General Stores will accept used toner cartridges and pick them up from the same spot on the ground floor near 31 CNB where they drop off deliveries. Please use your original packing carton and mark **RECYCLE** on the top in large letters. UI does receive revenue from these returns.
3. Integrated Call Center (ICC) – If you are conducting a research study and/or are recruiting subjects, especially via various media ads, consider sending information to Jane Moss, jane-moss@uiowa.edu or call her at 384-8602. The ICC is a

telehealth program that promotes UIHC and enhances access to services and program. They have a 24-hour UI Health Access line that is staffed by RNs and other referral specialists (non-clinical staff) who help callers find a UIHC physician or access information on clinical trials and research opportunities and to provide general information about health conditions, diseases and treatments.

4. Digital recording equipment and transcription accessories source used by other CON-ONRS faculty/staff.
<http://www.transcriptionsupport.com/>
5. Document Storage and Management: The Advantage Companies, located in Cedar Rapids, Iowa, has developed relationships with over 40 departments throughout the UI/UIHC for storage and imaging of documents. They have negotiated rate and high level of service with Sherri Dusenbery in UI Purchasing. For more details and sample contract, <http://www.uiowa.edu/purchasing/contracts/index.html>
6. FWA – Federalwide Assurance numbers for organizations of community-based programs/studies
 - a) Link to the US DHHS website to track numbers: <http://ohrp.cit.nih.gov/search/fwasearch.aspx?styp=bsc>
 - b) Select the **FWAs** tab and click on the **Advanced Search** link. Sort by state (Iowa), then Search. You will get a list of all the organizations in Iowa with a FWA number. Click on the heading bar to sort by City or Institution.
 - c) FWA numbers expire after 3 years.
 - d) FWAs are not study specific, but they do need to be updated whenever a new IRB agrees to be an IRB of record for an organization/institution. OHRP (HHS Office for Human Research Protection) only allows the authorized officials of the organization to apply for, update and reactivate FWAs. It's not something you could do for them or that the IRB can do. The agreement is between OHRP and the organization.
7. DXA Scanner – Grants that use the DXA scanner in the second floor Research Suite will be charged for use of the equipment. Revenue from scans for research grants will then be used to pay for maintenance and repairs, and eventually replacement of the DXA equipment. Contact Cheri Arneson with number of procedures performed and grant MFK to bill. She will then provide an invoice to the grant for the expenditure.